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Gateway User Guide

Form 3 Notice to Taxpayers

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Introduction

Form 3 - Notice to Taxpayers is used as the template for publishing your proposed budget, as required by law. Form 3 contains two sections of information. First, it informs taxpayers of the time, date, and location of your public hearing and adoption meeting. Second, it presents a summary of the proposed budget and a comparison against last year's levy.

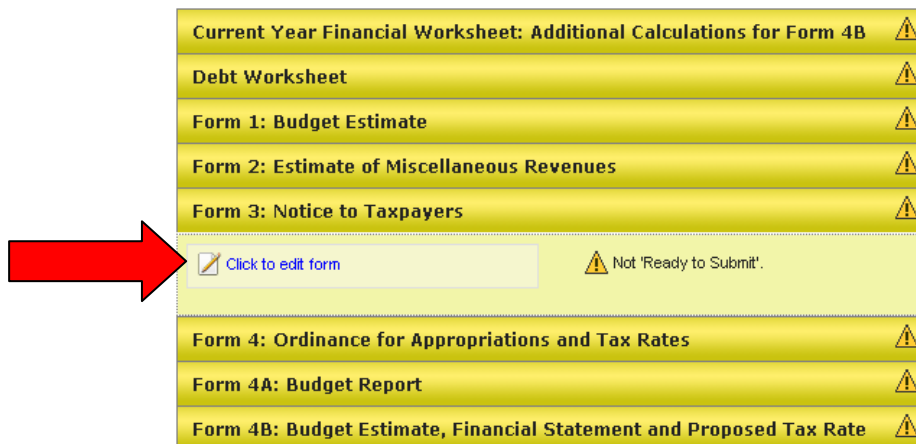
Form 3 should be submitted electronically through the Gateway once it has been sent to be published. A hard copy of the Proof of Publication issued by the publishing company must be scanned and uploaded. For more, see the last section of this user guide entitled "Additional Submission Requirements for Form 3."

Accessing Form 3

First, navigate to the Budget Form Menu by selecting your unit and then clicking "View Forms, Enter and Edit Budgets."





Now that you are on the Budget Form Menu, click on Form 3 and then select the "Click to edit form" link. This will load the form. Please be aware it may take a few seconds to load.



Ensuring that Form 3 is Generated Correctly

Similarly to other forms that have an option to fill from other forms, Form 3 can pull certain information for DLGF reviewed funds from Form 4B's published column. Therefore, before printing Form 3 to take to the newspaper or submitting Form 3, it is very important that Form 4B published columns have been entered into Gateway for every fund. The adopted column of Form 4B does not need to be completed prior to generating Form 3.

Funds Required For Expenses To December 31st Of Incoming Year	Published Amount	Adopted Amount
1. Total budget estimate for incoming year	\$ 10000	\$
2. Necessary expenditures, July 1 to December 31 of present year, to be made from appropriation unexpended	\$ 8000	\$
3. Additional appropriation necessary to be made July 1 to December 31 of present year	\$ 1000	\$
4. Outstanding temporary loans:	\$ 0000	\$

Entering Data on Form 3

The first section of Form 3 is completed by means of a pop-up box. The second section can be pulled with a click of a button. The Current Tax Levy (column 5) will pre-populate for all counties except LaPorte.

NOTICE TO TAXPAYERS



Complete details of budget estimates by fund and/or department may be seen by visiting the office of this unit of government at [\[No Unit Office Location Entered\]](#). The political subdivision or appropriate fiscal body shall publish this notice twice in accordance with IC 5-3-1 with the first publication at least ten days before the date fixed for the public hearing and the second publication at least three days before the date fixed for the public hearing.

Notice is hereby given to taxpayers of [Elna Troy Township, Whitley County, Indiana](#) that the proper officers of [\[No Name of Adopting Unit Entered\]](#) will conduct a public hearing on the year 2014 budget. Following this meeting, any ten or more taxpayers may object to a budget, tax rate, or tax levy by filing an objection petition with the proper officers of [\[No Name of Adopting Unit Entered\]](#) not more than seven days after the hearing. The objection petition must identify the provisions of the budget, tax rate, or tax levy to which taxpayers object. If a petition is filed, [\[No Name of Adopting Unit Entered\]](#) shall adopt with the budget a finding concerning the objections in the petition and testimony presented. Following the aforementioned hearing, the proper officers of [\[No Name of Adopting Unit Entered\]](#) will meet to adopt the following budget:

[Fill in Hearing Info](#)

Date of Public Hearing	[No Public Hearing Date Entered]	Date of Adoption Meeting	[No Adoption Meeting Date Entered]
Time of Public Hearing	[No Public Hearing Time Entered]	Time of Adoption Meeting	[No Adoption Meeting Time Entered]
Public Hearing Place	[No Public Hearing Location Entered]	Adoption Meeting Place	[No Adoption Meeting Location Entered]

Estimated Civil Max Levy	[No Estimated Max. Levy Entered]
Estimated Fire Max Levy	[No Estimated Fire Max. Levy Entered]

1 Fund Name	2 Budget Estimate	3 Maximum Estimated Funds to be Raised (Including appeals and levies exempt from maximum levy limitations)	4 Excessive Levy Appeals (Included in Column 3)	5 Current Tax Levy
	Click Here to Insert Form 4b published amounts 	Click Here to Insert Form 4b published amounts 		
0061-RAINY DAY	\$ 0	\$ 0	\$ 0	0
0101-GENERAL	\$ 0	\$ 0	\$ 0	21,263


Inserting the Hearing Information

The paragraph at the top of Form 3 will first show incomplete fields as red text. To populate these lines, click the button that says “Fill in Hearing Info.”

FORM APPROVED BY STATE BOARD OF ACCOUNTS
NOTICE TO TAXPAYERS

Complete details of budget estimates by fund and/or department may be seen by visiting the office of this unit of government at [No Unit Office Location Entered]. The political subdivision or appropriate fiscal body shall publish this notice twice in accordance with IC 5-3-1 with the first publication at least ten days before the date fixed for the public hearing and the second publication at least three days before the date fixed for the public hearing.

Notice is hereby given to taxpayers of Etna Troy Township, Whitley County, Indiana that the proper officers of [No Name of Adopting Unit Entered] will conduct a public hearing on the year 2014 budget. Following this meeting, any ten or more taxpayers may object to a budget, tax rate, or tax levy by filing an objection petition with the proper officers of [No Name of Adopting Unit Entered] not more than seven days after the hearing. The objection petition must identify the provisions of the budget, tax rate, or tax levy to which taxpayers object. If a petition is filed, [No Name of Adopting Unit Entered] shall adopt with the budget a finding concerning the objections in the petition and testimony presented. Following the aforementioned hearing, the proper officers of [No Name of Adopting Unit Entered] will meet to adopt the following budget:

 Fill in Hearing Info

Date of Public Hearing	[No Public Hearing Date Entered]	Date of Adoption Meeting	[No Adoption Meeting Date Entered]
Time of Public Hearing	[No Public Hearing Time Entered]	Time of Adoption Meeting	[No Adoption Meeting Time Entered]
Public Hearing Place	[No Public Hearing Location Entered]	Adoption Meeting Place	[No Adoption Meeting Location Entered]

Estimated Civil Max Levy	[No Estimated Max. Levy Entered]
Estimated Fire Max Levy	[No Estimated Fire Max. Levy Entered]

This will bring up a pop-up box from which you will enter your hearing information, as well as your assessed value and maximum levy estimates.

Unit Info

Office Location:

Adopting Unit Name:

Public Hearing Info

Hearing Location:

Hearing Date:

Hearing Time:

Adoption Meeting Info

Meeting Location:

Meeting Date:

Meeting Time:

Estimated Civil Max Levy: \$

Once you have entered all the fields in the pop-up box, click "Update Record." This will enter the information into the paragraph. If wish to change any of the information, click "Fill in Hearing Info" again and change the necessary fields. Click "Update Record" and the changes will be made in the paragraph and the top of the budget chart.

Unit Info

Office Location:

Adopting Unit Name:

Public Hearing Info

Hearing Location:

Hearing Date:

Hearing Time:


Adoption Meeting Info

Meeting Location:

Meeting Date:

Meeting Time:

Estimated Civil Max Levy:



NOTICE TO TAXPAYERS

Complete details of budget estimates by fund and/or department may be seen by visiting the office of this unit of government at Jasper County. The political subdivision or appropriate fiscal body shall publish this notice twice in accordance with IC 5-3-1 with the first publication at least ten days before the date fixed for the public hearing and the second publication at least three days before the date fixed for the public hearing.

Notice is hereby given to taxpayers of Jasper County, Indiana that the proper officers of Jasper County will conduct a public hearing on the year 2014 budget. Following this meeting, any ten or more taxpayers may object to a budget, tax rate, or tax levy by filing an objection petition with the proper officers of Jasper County not more than seven days after the hearing. The objection petition must identify the provisions of the budget, tax rate, or tax levy to which taxpayers object. If a petition is filed, Jasper County shall adopt with the budget a finding concerning the objections in the petition and testimony presented. Following the aforementioned hearing, the proper officers of Jasper County will meet to adopt the following budget:

Date of Public Hearing	Wednesday, August 14 2013
Time of Public Hearing	6:00 PM
Public Hearing Place	County Court House

Date of Adoption Meeting	Friday, October 11 2013
Time of Adoption Meeting	6:00 PM
Adoption Meeting Place	County Court House

Estimated Civil Max Levy	\$ 5,905,150
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Inserting the Budget and Levy Information

The second section of the Notice to Taxpayers consists of a table that displays a list of budget and levy amounts for all funds. Although some funds may not have a levy, they will be included as well.

Please ensure that all necessary funds appear in this table. The list of funds in Column 1 is based upon the currently added funds. If any funds happen to be missing, please add them under the Customize Unit by Funds List page. Additional assistance on adding a fund can be found in the [Adding, Deleting, and Connecting Funds and Departments](#) user guide.

Once you have verified the funds list, you may begin entering data in the table. The budget estimates in column 2 and the maximum estimated funds to be raised in column 3 can be pulled from other forms or entered manually. The excessive levy appeals in column 4 will need to be entered manually.

Pulling Data from Other Forms

Before pulling data from the other forms, you will want to ensure that Lines 1 and 16 are entered in the published column of Form 4B for all funds. For assistance completing Form 4B please see the [Form 4B User Guide](#).

In order to pull the amounts from the other forms, simply click both grey boxes that read, “Click to insert Form 4B published amounts.” Please check to ensure the correct amounts have pulled in. This should pull data from Form 4B for all funds. If you have an excessive levy appeal, it will need to be manually entered; please see the next section.

The data in column 4 are the only amounts that require manual data entry for all units. This column is used to publish any anticipated excessive levy appeal. Values may be entered directly into the boxes in Column 4. Please be sure to save after entering any amounts.

The current tax levy in column 5 has been pre-populated from the previous year’s DLGF-certified budget order. Units in LaPorte County will need to manually enter their current tax levy in this column. You should verify that these values are correct before submitting the form for publication.

1 Fund Name	2 Budget Estimate	3 Maximum Estimated Funds to be Raised (Including appeals and levies exempt from maximum levy limitations)	4 Excessive Levy Appeals (Included in Column 3)	5 Current Tax Levy
	Click Here to Insert Form 4b published amounts ↓	Click Here to Insert Form 4b published amounts ↓		
0061-RAINY DAY	\$ 0	\$ 0	\$ 0	0
0101-GENERAL	\$ 0	\$ 0	\$ 0	16,386

Manual Data Entry

Users also have the option to manually key in the amounts for each fund. To do so, simply click in the desired field and enter the amount. Column 4, the excessive levy appeals must be manually entered. Once you have completed the table, please be sure to click “Save” on the bottom right-hand side.

1111-FIRE	\$ 25,000	\$ 6,400	\$ 1,700	5,462
9500-the home rule fund	\$ 4,200	\$ 0	\$ 0	0
Totals:	Total: \$ 529,200	Total: \$ 238,400	Total: \$ 1,700	Total: \$ 21,848

Form values saved at 09:43 AM

Save



Once you click save, the amounts will total and red text will display the time the form was saved.

Marking the Form “Ready to Submit”


At the bottom of Form 3 and all other forms you will notice the Ready to Submit status boxes. Before you complete the form you will notice a grey box that is titled Not Ready to Submit.

The budget forms have a feature built in called validation. This does not allow the form to be marked as Ready to Submit, or be submitted until the required fields are completed. Validation will help prevent some commonly found errors in previous years. Under a closer look, you will notice that the box states,


“You will be able to mark this form as 'Ready to Submit' once all required fields have been completed.”

 Not Ready To Submit 
You will be able to mark this form as 'Ready to Submit' once all required fields have been completed.

Once the required information has been entered, the yellow Ready to Submit option will appear. This gives users with submission and editing rights the ability to mark the form as ready to submit by clicking on the check box. You will not want to check this box until all fields have been completed.

<input type="checkbox"/> Ready to Submit 
This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

Once this box is checked, the box will turn green and the form will now be marked as Ready to Submit. Form 3 will still be editable until it is submitted.

<input checked="" type="checkbox"/> Ready to Submit 
This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

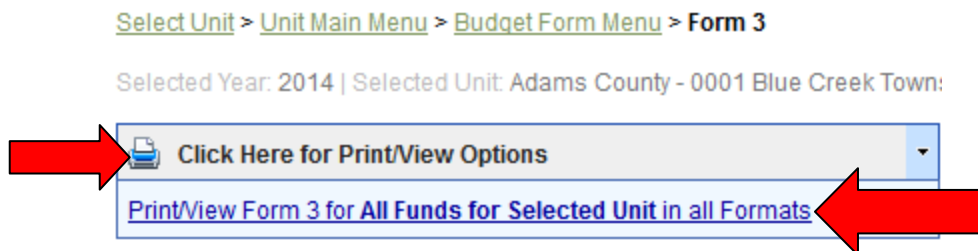
Additional Submission Requirements for Form 3

While Form 3 is the document that is given to a publisher to comply with publication requirements outlined in Indiana Code 6-1.1-17-3, the DLGF will also collect the Proof of Publication, which contains the newspaper clipping and the publisher's claim/affidavit. This document must be submitted as a duplicate of the original. It will only be accepted as a file upload (PDF or picture file) through Gateway.

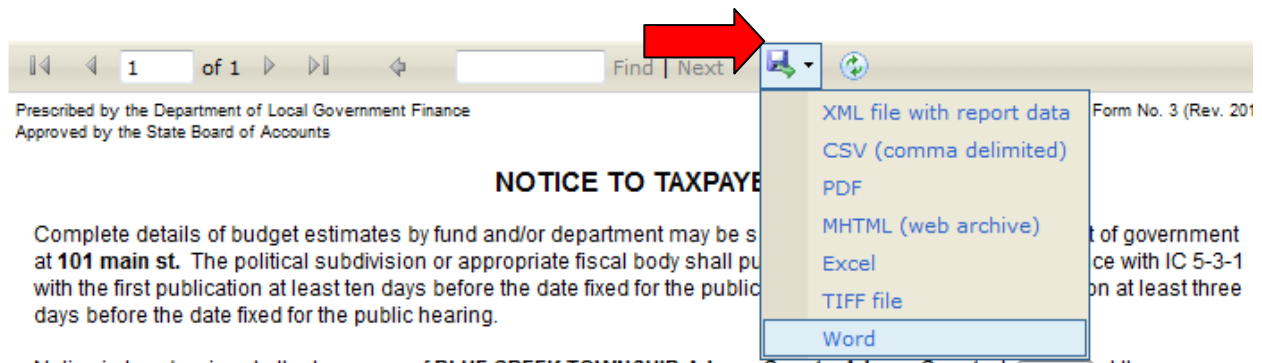
Viewing and Printing the Form

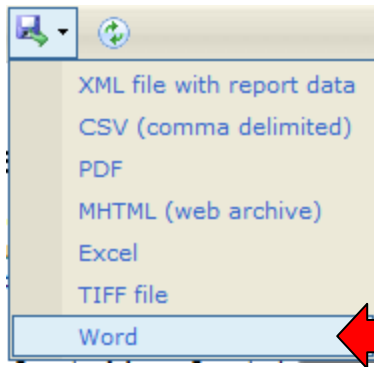
Printing the Form 3 is an important part of the budget process as it allows you to publish your public and adoption hearing information along with your budget estimates, levy, and rates. Advertising your Notice to Taxpayers on time is a vital component to budget approval.

The Form 3 can only be printed after being marked as ready to submit. Once the Form 3 has been marked as ready to submit, you should notice the drop down menu on the top-left corner of the form that reads, "Click Here for Print/View Options." If this area still reads, "Print options only available once Form 3 is marked 'Ready to Submit'," try saving or leaving the Form 3 and accessing it again. Click on the drop down menu that states, "Click Here for Print/View Options." From here, you select the format option to continue.



Once you see the page appear in a new window click on the icon that resembles a save icon in the middle at the top of the page to view the export options.





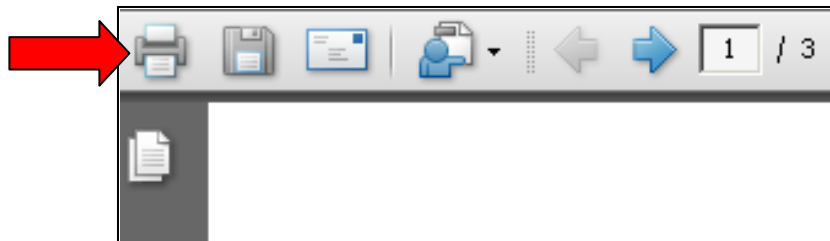
From the list of export options, you may export your Notice to Taxpayers into a PDF, Word, Excel or many other different file types. This allows you to personalize how you wish to have your data displayed.



You may want to save the Notice to Taxpayers as a Word file and send it to the publishing company. Often publishers will charge less when they are able to copy and paste the advertisement as opposed to recreating it by hand from a printed copy.

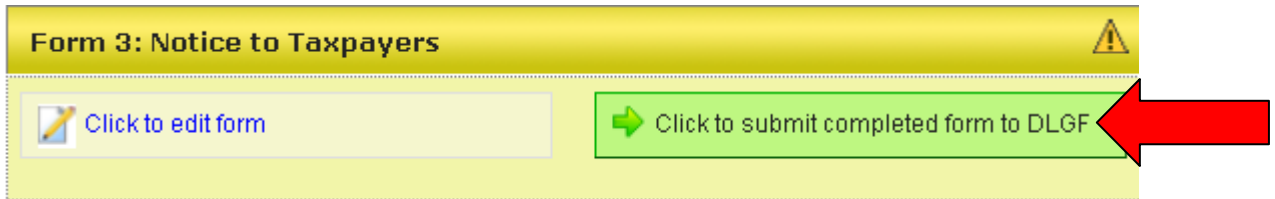


If you choose to export your Notice to Taxpayers into Word you will want to save it so that you may email it to the publishing company. You will first want to click the “File” button, then click “Save as,” lastly, be sure to save it in a location and identifiable name so that it can be easily located. If you choose to open the Notice to Taxpayers in PDF you will see the following page appear. You may click on the printer icon on the top left hand corner to print. You may also select the save icon to the right in order to save the form as a PDF which will also allow you to email a copy of your Form 3 as a PDF.

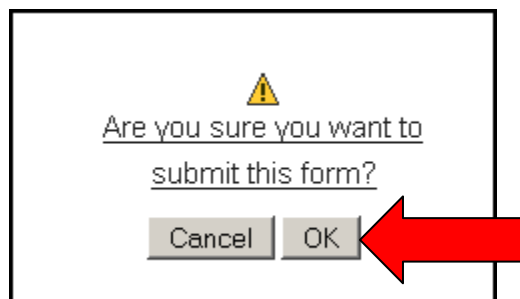


Submitting Form 3

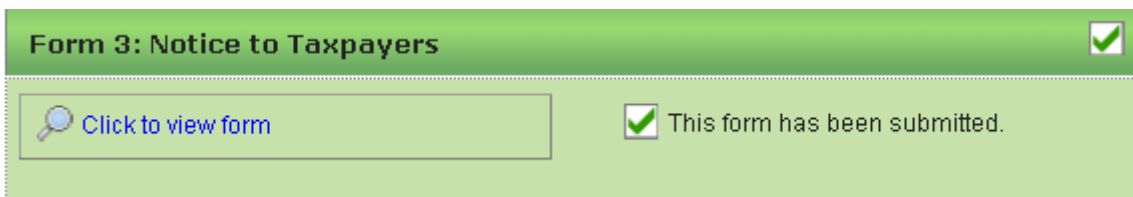
You will want to submit Form 3 once it has been sent to be advertised. Once Form 3 has been marked as Ready to Submit, Form 3 under the Budget Form Menu now shows a green submit option.



Once you have sent the Notice to Taxpayers to be published and will not need to make any changes, you will want to click on the green submit button. You will notice a pop-up box asking you if you are sure you want to submit this form. If you are sure simply press OK.



As you will note below, Form 3 on the Budget Form Menu will now appear green and will now only have the option to view the form.



You may no longer edit a form once it is submitted. If you have submitted a form by mistake please contact the DLGF at gateway@dlgf.in.gov or at 317-232-3777.

Scanning and Uploading the Proof of Publication

Please note that you will need to scan and upload your Proof of Publication (and signed Form 4) into Gateway. We apologize, but we will only accept copies submitted by the upload tool.

You will first need to scan your Proof of Publication and save it in a location where you can find it. If you do not have a scanner, you will need to locate someone with one. Local libraries and sometimes other officials such as county auditors may offer assistance.

A list of Gateway Help Centers that have volunteered to serve as a resource can be found at http://www.in.gov/dlgf/files/2012_DLGF_Gateway_Help_Centers.pdf.

Once you have scanned your documents, please click on “Submit Proof of Publication and Signed Form 4” on the Unit Main Menu.

Department of Local Government Finance Tasks



Customize Funds, Departments, Debts, Rev. Codes

View and edit lists of funds, depts., debts by fund and rev. codes.



View Forms, Enter and Edit Budgets

View, edit and submit Forms to DLGF.



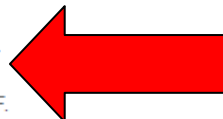
County Council Review Worksheet

View and edit the County Council Review Worksheet for the selected unit.



Submit Proof of Publication and Signed Form 4

View, upload and submit budget-related documents to DLGF.

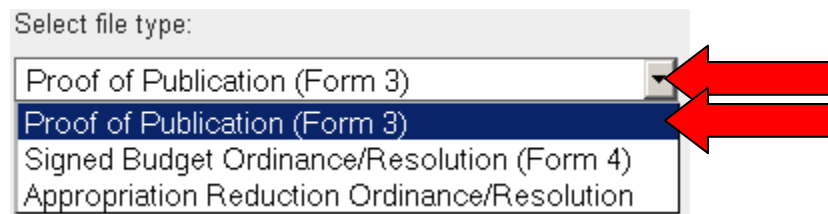


You will now need to complete the fields below along with locating your file.

Submit File
Select file type: Enter description for 'Other':
Enter a Description:
Select File to Upload:

There are no files uploaded for this unit.

If you click on “Proof of Publication (Form 3), you will be able to select the other documents that can be uploaded. You will want to leave “Proof of Publication Form 3” selected.



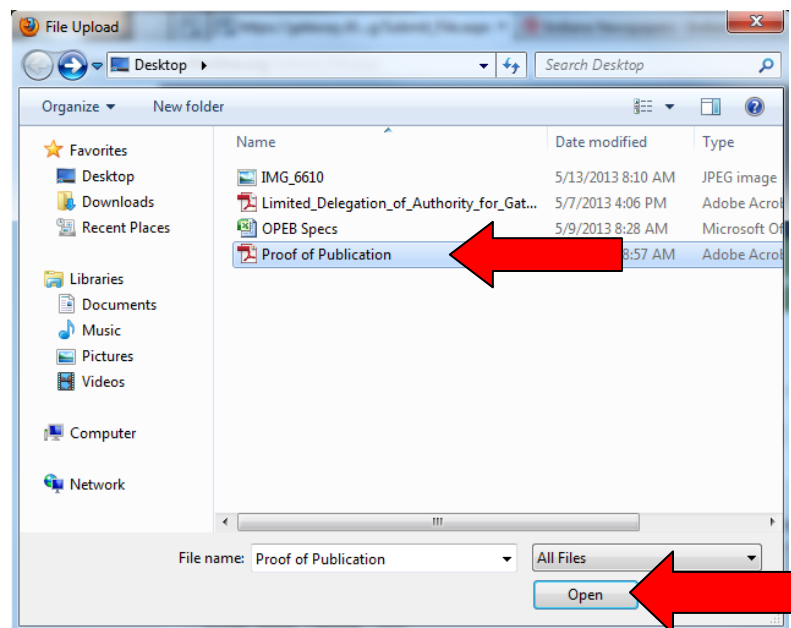
You will then need to enter a description.

A screenshot of a web form titled 'Submit File'. It contains a 'Select file type:' dropdown menu with 'Proof of Publication (Form 3)' selected. To the right is a text box labeled 'Enter description for 'Other':'. Below the dropdown is a text box labeled 'Enter a Description:' with the text 'South Bend Tribune - Pre' entered. Below that is a 'Select File to Upload:' section with a text box and a 'Browse...' button. At the bottom are 'Upload File' and 'Browse...' buttons. A red arrow points to the 'Enter a Description:' text box.

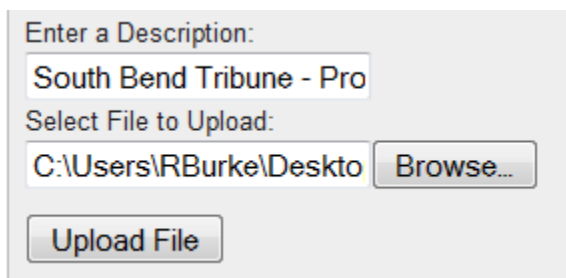
There are no files uploaded for this unit.

To locate the file, click on “Browse.”

From here, select the appropriate location and then select the file. With the desired file highlighted, click “Open.”

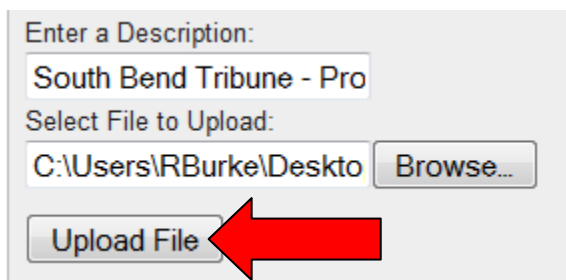


You will now notice the file path appear to the right of the browse button.



Enter a Description:
South Bend Tribune - Pro
Select File to Upload:
C:\Users\RBurke\Desкто Browse...
Upload File

Your last step in uploading your Proof of Publication is to click the “Upload File” button.



Enter a Description:
South Bend Tribune - Pro
Select File to Upload:
C:\Users\RBurke\Desкто Browse...
Upload File

Once successfully uploaded, you should see all uploaded files appear below. If you wish to verify that the correct document was uploaded, click on the blue underlined file name and this will open the uploaded file.

Publication File Upload Successful			
Upload File			
Publication File Name	File Type	File Description	File Upload Date
Proof of Publication.pdf	Proof of Publication	South Bend Tribune - Proof	5-14-2013

Congratulations! You have successfully submitted your Form 3: Notice to Taxpayers. Please see our other user guides for assistance with other forms. If you have any questions, please email the Gateway inbox at gateway@dlgf.in.gov.